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March 19, 2020

PARTIES OF RECORD

Re: Case No. 2019-00366

Attached is a copy of a memorandum, which is being filed in the record of the above-referenced case. If you have any comments you would like to make regarding the contents of the memorandum, please do so within five days of receipt of this letter.

If you have any questions, please contact Nancy Vinsel, Assistant General Counsel at 502-782-2582.

Sincerely,

A handwritten signature in blue ink, appearing to read "K. Chandler".

Kent A. Chandler
Executive Director

njv

Attachment

INTRA-AGENCY MEMORANDUM

KENTUCKY PUBLIC SERVICE COMMISSION

TO: Case File No. 2019-00366
FROM: Nancy J. Vinsel, Assistant General Counsel
DATE: March 19, 2020
RE: Informal Conference of March 17, 2020

Pursuant to Staff Notices issued on March 2, 2020 and March 11, 2020, a video informal conference ("IC") was conducted on March 17, 2020. Attached is a copy of the attendance roster.

The purpose of the IC was for the parties' to develop proposed uniform HEA program guidelines. After a substantive discussion, the parties produced the attached document with common tenets regarding HEA programs that the parties support.

There being no further discussion, the IC was then adjourned.

Attachment: Sign in sheet
HEA Common Tenets

cc: Parties of Record

COMMONWEALTH OF KENTUCKY
BEFORE THE PUBLIC SERVICE COMMISSION

In the Matter of:

ELECTRONIC INVESTIGATION OF HOME)
ENERGY ASSISTANCE PROGRAMS OFFERED) CASE NO.
BY INVESTOR-OWNED UTILITIES PURSUANT TO) 2019-00366
KRS 278.285(4))

March 17 and 18, 2020

NAME	REPRESENTING
Nancy Vinsel	PSC
Mary Beth Purvis	PSC
Keegan Arnold	PSC
KaBrenda Warfield	PSC
JEB Pinney	PSC
Kent Chandler	PSC
Larry Cook	Attorney General
John Horne	Attorney General
Karen Greenwell	Counsel – Community Action Kentucky
Roger McCann	Community Action Kentucky
Susanne Funken	Community Action Kentucky
Dr. Lisa Lee Williams	As former director of AEP/ASAP
Catrena Bowman-Thomas	Northern Kentucky CAC
Sharon Price	Lexington CAC
Erin Hensley	Lexington CAC
Melissa Tibbs	Lexington CAC
David Falconberry	Lexington CAC
Brooke E. Wancheck	Columbia Gas
Susie Durr	Columbia Gas
Judy Cooper	Columbia Gas
Monica Braun	Delta Natural Gas
Jenny Lowery Croft	Delta Natural Gas

David Samford
Allyson Honaker
Chuck Sessions
Cindy Givens
Rick Mifflin
Chad Lynch

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Eileen Saunders
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LG&E/KU
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LG&E/KU

HEA COMMON TENETS

- Prefer a single HEA Administrator for Utilities, but who that is can vary by utility
- Common IT system for program management by utility
- Term of HEA program – determined by utility
- Administrative Fees – Actual up to 10%; the rest should go to benefits; flexibility for needed large expenditures separately negotiated by each utility and administrator; legal and IT fees allowed only if directly related to administration of HEA fund
- Amount of Benefit – flexible by utility with input from CAAs; reviewed every 1-3 years; fixed amount; slots determined by funding; unspent rolls over but should be reviewed to minimize underspend
- HEA surcharge amount – assessed on a per customer basis, but flexible in amount
- Promotion of HEA availability – by everyone
- Eligibility Requirements – Flexible – LIHEAP equivalent or up to 200% poverty level; arrearage limitations – utility by utility basis
- Program Prioritization – work with CAAs; have waitlists; work with CAAs on prioritization; dissolve waitlist at the end of each program year
- Enrollment Process – Enrollment or re-enrollment requirement each year; one stop shop; provide referrals as appropriate for energy efficiency education and weatherization programs
- Reporting Requirements/Oversight – program audits every 5 years by third party or utility with copies to KPSC; monthly reporting to utilities by CAAs/Administrator and other communications as determined by each utility; annual reporting to KPSC
- Future changes to HEA programs - Identify in annual PSC report
- Timing – in accordance with contractual terms of existing agreements and subject to requirements of any settlement agreements.

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